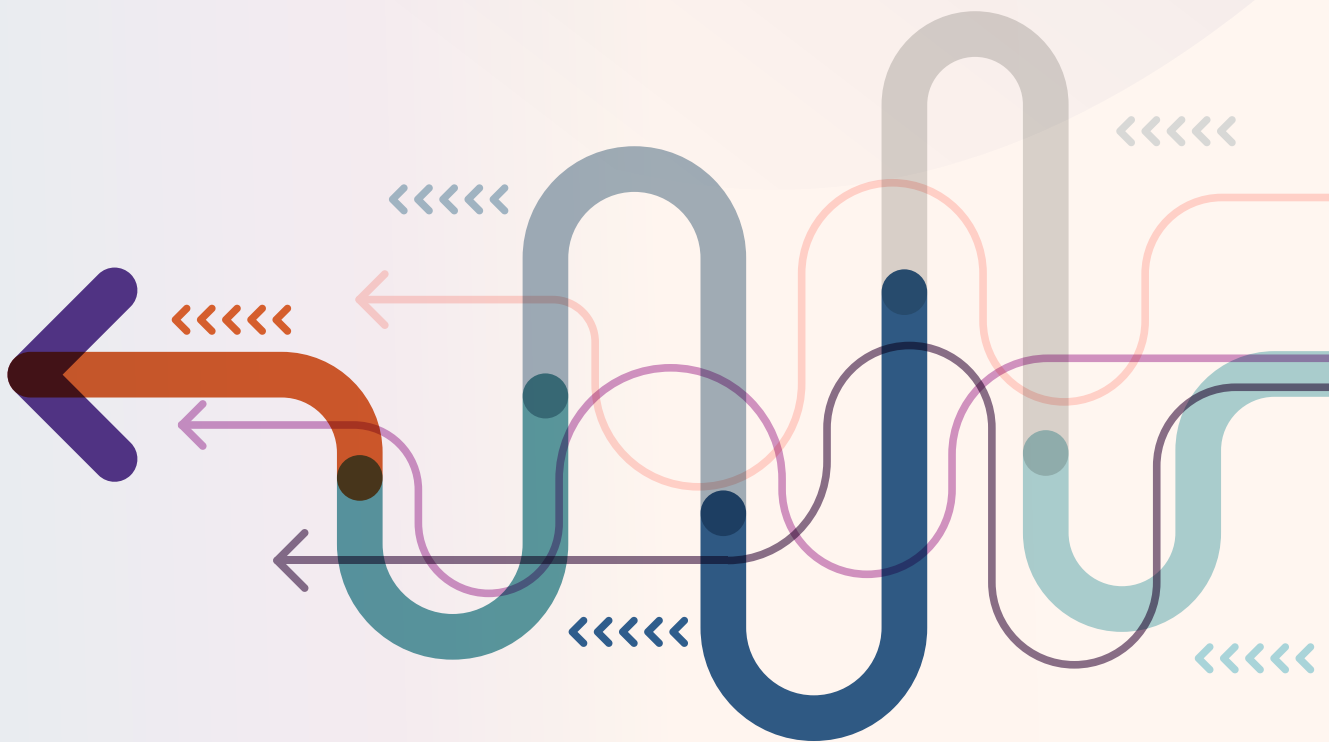




OKR Navigator

A practical guide
to implementing and using **OKRs**



in cooperation with
OKR Mastermind

The goal of this guide is to provide a practical and comprehensive manual on how to start with OKRs and avoid common missteps. We draw from real experiences in our implementations and usage within our companies, as well as from what is widely agreed upon in the global OKRs community and what works for other companies.

Guidance and parameters are set for companies with approximately up to 200 employees. For larger companies, a different type of implementation or different parameters may be more suitable. It's important to realize that **there is no one right way to use OKRs. It's a tool that should fulfill the needs defined by your specific company.** Therefore, it needs to be customized. With this guide, you can get off to a good start, and the rest is entirely in your hands.

In order to give you the best of our practice, we invited top professionals who live the OKR method to create the ebook. Martin Imrich and Jan Sebek. I believe that this is not the only reason why the ebook will be a great help to you!



Milan Rataj

Co-founder & Customer Happiness Lead

Sloneek Europe

Let's dive in! 

Pro rychlou orientaci

Clarify Why You Want To Start With OKRs	4
Necessary Preconditions for Successful Implementation	5
What Can You Not Miss If You Decide To Use OKRs?	6
Key Success Factors	6
Examples of Good Practices in Setting OKRs	7
Start With a Pilot Deployment Implementing	9
Focus on Results, Not Outputs	11
How to Write Good Objectives	12
How To Write Good Key Results	14
How To Set the Whole Cycle	16
OKRs Workshops	17
Creating OKRs at the company level	17
Workshop Part 1	17
Workshop Part 2	18
Creating OKRs at team level	18
Closure and evaluation of OKRs	19
OKR check-ins	20
OKR Tracking	21
Roles in OKRs	22
Cross-functional OKRs	24
Examples of cross-functional OKRs	24
How to make cross-functional OKRs work?	25
Example of Specific OKRs in One Company	26
How To Use OKRs and KPIs Together	27
Remember that...	28

Clarify Why You Want To Start With OKRs

NOTE

[In the introductory e-book](#), we explained what the abbreviation OKR means.

O - Objective (qualitative, inspirational goals that define what we want to achieve),

KR - Key Results (quantitative, measurable, and time-bound indicators that define how we will know we have achieved the goals (Objective). They show progress towards achieving the goals.

In the text, we use the abbreviations **OKRs** and **OKR**. We use OKR for a specific set of Objectives and Key Results. OKRs are used to refer to the entire methodology or more than one OKR (e.g., at the company level, we have 3 OKRs).

Why are you starting with OKRs? What needs should they address for you? What should they bring to you? These are some of the key questions that need to be answered before implementation.

“Because Google does it”, is not a good motivation. Google has a unique corporate culture and also the usage of OKRs. Emulating it will be challenging. Expecting that the introduction of OKRs will solve all our problems is also wrong. Clarify and choose one primary reason for introducing OKRs. This will allow you to tailor your implementation and then better evaluate the impact, whether you are meeting your needs.

OKRs are a tool for executing strategy. Most companies seek better alignment across the organization toward a common goal and increased awareness of priorities.

Without communication and clarification of WHY, employees can only speculate about your other motivations. **“Do they want to monitor what I'm doing now? Or dictate tasks to me because of this?”** Effective communication will also ensure better adoption and understanding within the company.

PRACTICAL TIP

How to define the primary reason for introducing OKRs

Invite your leadership team and key individuals whom you want to involve in OKRs, and discuss **why you want to start with OKRs**. Use Miro or a flip chart and sticky notes if you are physically together. Allow a 5-minute silent brainstorming session, where each person writes down the main reasons and motivations for introducing OKRs individually. Then, place them on a prepared surface and introduce them to each other. A facilitator will help group similar notes together. Once you have the groups, vote on the most important need. Discuss the result afterward.

Time required: 30-60 minutes

Necessary Preconditions for Successful Implementation

At various points in the text, we will repeat that OKRs are a system for setting goals and **implementing a strategy**. To successfully implement OKRs and harness their potential, it's essential to have a well-defined mission, vision, and strategy. In the diagrams below, you can see where OKRs fit within the organizational system. It's not necessary to adhere precisely to what is drawn in the picture. **What matters is that you have a long-term goal you want to achieve.** In such a case, it's the right time to leverage the potential that OKRs offer.

If such a goal doesn't exist, you will always find yourself in a situation where you struggle to set up OKRs correctly. The benefits of transparency and the collaborative work of the entire organization aimed at achieving goals will be lost.



MISSION

What is it? The mission defines the purpose of the organization, answering the question “Why do we exist?” It's a fundamental principle that remains constant.

Example: “We strive for a better and more open world through digital connectivity.”

How long does it last? The mission is permanent and does not change unless the essence or direction of the company undergoes a fundamental change.

VISION

Vision:

What is it? The vision describes where the organization is heading in the future, answering the question “How do we envision the future?” or “What do we want to become?”

Example: “We aim to be a global leader in providing digital communication services.”

How long does it last? Vision usually covers a longer time horizon, often 3-10 years or even longer.

STRATEGY

Strategy:

What is it? Strategy determines how the organization will achieve its vision. It's a set of interconnected decisions that position you on the chosen battlefield for victory.

Example:

Low Cost: Companies like Walmart focus on low costs and efficiency, allowing them to offer goods at lower prices than the competition.

Differentiation: Apple focuses on the design and user-friendliness of its products, has a closed system, enabling them to sell at higher prices and achieve higher margins.

How long does it last? It depends on the nature of the strategy, but it typically falls within the range of 1-5 years.

OBJECTIVES + KEY RESULTS

Objectives + key results:

What is it? OKRs are a framework for setting and tracking goals and their achievement. They help translate the strategy into measurable, concrete steps and tasks.

Example:

Objective: “Expand into the Asian market.”

Key Results: “Establish partnerships with 5 major local distributors in the next year.” or “Achieve a 20% market share in Asia by the end of the year.”

How long does it last? OKRs are shorter-term and are often set on a quarterly or annual basis.

What Can You Not Miss If You Decide To Use OKRs?

Key Success Factors



Leadership Support: The organization's leadership must take an active role in advocating and supporting OKRs. If leadership is not following OKRs or not paying attention to them, teams may feel that it's not a priority, making it harder to get their involvement. Leadership must not only support the implementation of OKRs but also **actively create and monitor their own OKRs. Support in having the courage to try, fail, and try again is also crucial.**



Someone Leading the Implementation: Implementing OKRs requires a responsible person (often referred to as an 'OKRs Ambassador') who coordinates, educates teams, and addresses any issues during implementation.



Regular Check-Ins: Regular meetings where teams review their OKRs and discuss progress, challenges, and necessary adjustments are crucial to keep moving towards achieving goals.



Regular Feedback Collection and Evaluation: Collecting feedback from teams and individuals is essential for understanding what works and what needs improvement. It's also important for adapting the OKRs process to be as effective as possible. Teams and individuals should have the space to discuss, create, and adjust their OKRs. **It's crucial for them to feel engaged and co-responsible.**



Decoupling Direct Link of OKRs to Rewards: While motivation is important, it's crucial not to directly link OKRs to financial rewards. This could lead to setting 'easily achievable' goals rather than encouraging bold and innovative thinking.



Company-Wide Communication About OKRs: Explaining the reasons and benefits of using OKRs for the entire organization helps gain the understanding of all team members and their willingness to support the implementation.



Effective Training: Providing maximum support in how to set and track OKRs correctly ensures that all team members are on the same page and understand the process.



BAU (Business As Usual) Doesn't Belong in OKRs: OKRs should be focused on strategic goals and innovation, not routine operational tasks. It's important to distinguish between what is normal daily activities and what are key goals for growth and improvement.



Safe and Transparent Environment: Creating a culture where teams feel comfortable setting ambitious goals and sharing failures without fear of punishment is crucial for OKRs' success. Safety allows for honest communication and continuous improvement.



Adoption of a Learning Culture: OKRs are demanding, and it's often not possible to achieve them 100%. The organization must perceive failures as opportunities for learning, not as failures.

Examples of Good Practices in Setting OKRs

Program Levels of OKRs

- **Company Level:** Reflects the main strategic goals of the company for a specific period.
- **Team Level:** Based on the company level, teams create their OKRs that support the company's goals.

Number of OKRs

- **At the highest company level,** it's recommended to have a maximum of **1-3 Objectives** and **2-4 Key Results for each Objective**. Less is more; focus on the most important things.
- **At the team level,** it's recommended to have a maximum of **1 Objective** for a single period.

OKRs Evaluation System

There are several ways to approach OKRs evaluation:

- **Scale 0-100%**
The goal is to achieve a value between 60-70%, which means that OKRs are met and at the same time were sufficiently ambitious. If we achieve a lower percentage or, on the contrary, achieve 100%, we need to discuss whether the goals were set correctly.
- An alternative approach may be evaluation where **success is defined as achieving 100% of the set results**. It's essential to work with the understanding that setting a goal that we believe in entirely can suppress ambition, and instead of a fundamental change in thinking, we only achieve small increments. It's ideal to set a goal that is 10-20% more elastic than what the team or company believes in and then consider achieving 100% of the result or getting as close to it as a success.

Rhythm

- **Weekly/Bi-weekly check-ins:** Short regular meetings to verify progress.
- **Evaluation based on the planning cycle:** Evaluating how the team or individual achieved their OKRs.

Where OKRs will be tracked

We recommend starting with a tool that is already used in the company. It avoids the need for additional training and adoption of a new system with OKRs. You can use Excel, Notion, Confluence, Jira, or similar tools. Specialized OKRs software can be useful in a later stage when the company has adopted OKRs and wants to make the process more efficient.

Cycle Length

In companies, the most common cycle is still quarterly, **at most, annual for the highest level**. However, lately, the trend is increasingly **using a four-month planning period**, called a **cycle** (3 x 4 months).

The reason is, for example, the mental separation from quarterly rewards but also a reduction in administration and avoiding the typical busy period when business results are rushed at the quarter's end, evaluations are conducted with employees and partners, and it can be more challenging to find enough space for OKRs planning.

Types of KRs (Key Results)

Most commonly, we encounter two types:

- **Quantitative:** these KRs are focused on measurable outcomes.

Example: Increase website traffic by 20%.

- **Qualitative:** these KRs are of a "milestone" type. In this case, we set specific milestones or outputs we want to achieve as KRs.

Example: Obtain a safety certification.

Both types can be further divided into:

- **Leading:** these KRs help us pre-determine if we can impact a metric that moves more slowly (referred to as lagging). The advantage is faster feedback, and the team usually can influence it better, making it a better choice for use in OKRs. However, it is also harder to find, and there is not always a direct correlation with the lagging metric.

Example: Increase the website page views from 100 to 300 weekly. Increase daily app logins from 20 to 100.

- **Lagging:** these KRs best capture success, but they move more slowly, and it is often difficult to influence such a metric.

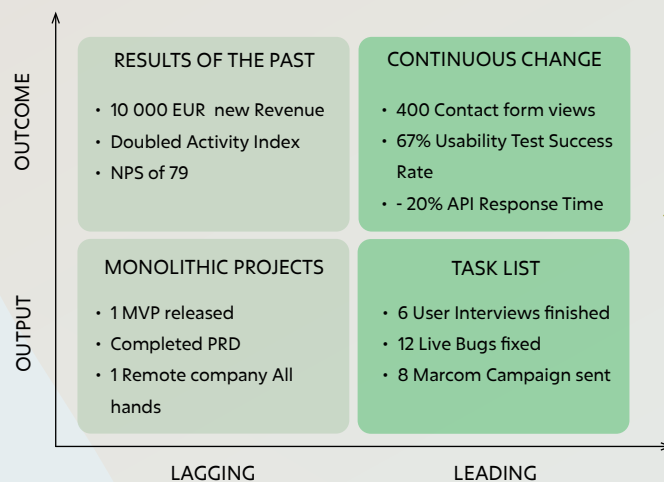
Example: Record a 15% increase in sales. Reduce customer churn rate to 5%.

PRACTICAL TIP

The best practice for KRs often includes quantitative leading metrics focused on outcomes, not outputs. They define a clear target, are team-influenced, and provide quick feedback so that we can see whether our efforts have the desired impact or not. It can also be functional to complement such metrics with one lagging metric that clearly represents the success of a particular effort. Therefore, it can be said that the combination of leading and lagging qualitative metrics will work best.

On the other hand, it may sometimes be difficult (or even counterproductive) to find such metrics, so don't hesitate to use qualitative KRs. It depends on what will work best for you, and regularly evaluate that. Primarily, aim for quantitative KRs focused on outcomes, but there's no shame in having a few qualitative KRs in the form of outputs.

Leading and Lagging metrics can be both quantitative and qualitative!



Adapted from [Tima Herbig \(herbig.com\)](https://herbig.com).

CONTENT TIP

You can find additional inspiration from [Tim Herbig on his blog about OKRs](#).

Who will be involved in OKRs

It's not necessary to involve everyone in the company in OKRs. Consider which teams can primarily contribute to the strategy and, conversely, for which OKRs may not be useful. It's also not necessary for everyone to contribute in every period when they can't influence the specific goals or when they are dealing with a very busy period, primarily focused on operations.

OKRs are certainly a suitable tool for company management and customer-oriented teams that have a direct impact on the strategy, such as **R&D, Sales, Marketing, or Customer Care**. They can also work well for HR. They may be less suitable for teams that support others or are more project-oriented, such as Backoffice, Finance, or internal IT. However, OKRs can still be used for local innovations in those areas. It's essential to evaluate how effective it will be in each case. **Each company needs to assess and adapt it to its context.**

Start With a Pilot Deployment Implementing

NOTE

OKRs represents a change. It usually involves a complete shift in how the organization operates and how people think within it. Such a change needs to be communicated very well and managed correctly.

OKRs can be introduced through a company-wide deployment or a pilot deployment in a selected team. For companies with around 10 employees or fewer, it makes sense to introduce OKRs company-wide and involve everyone because it's natural for this type of company. However, elsewhere, it's proven to be effective to use a pilot deployment approach to introduce them.

Why pilot deployment?

Every company has a different culture, different processes, and different ways of operating.

In advance, you never know what obstacles you might encounter. Additionally, deploying OKRs correctly is not a simple task. By starting with a pilot, you'll become more familiar with OKRs. It will make it easier for you to scale them further within the organization.

How to choose the right team for the pilot?

In general, it's a good idea to focus on the following teams and aspects:

- **Organizational leadership:** Leadership should lead by example, and OKRs often start with them, making them suitable candidates for piloting.
- **Change-oriented teams:** If there is a team known for its openness to innovation and trying new approaches, it could be an ideal candidate for the initial implementation of OKRs.
- **Smaller teams:** Smaller teams often adopt new processes and methods more easily because they are less burdened by bureaucracy and can be more flexible.
- **High-visibility teams within the organization:** If a high-profile team successfully adopts OKRs, it can serve as a positive example for other teams and motivate them to follow suit.
- **Goal-oriented teams:** Departments that already have experience in setting and tracking goals can more easily embrace OKRs. These could be teams like marketing, sales, or product teams.
- **Teams with lower operational burdens:** It's not advisable to introduce a new methodology to an overloaded team. OKRs require a change and a certain mental space, which is incompatible with a team where everything is urgent and there's little room to breathe.

PRACTICAL TIP

If we were to choose the first teams for implementation, they would be **marketing, management, R&D, or customer care**. We wouldn't select teams where it's more challenging to find customer impacts, such as internal IT or back-office.

It's a good idea to **start with management and a maximum of one selected team** that is open to experimentation and willing to try it out. Don't begin with teams that have the most problems or are overwhelmed by operations.

By piloting in one team, you also get to see how the execution level works. This team can then share its experiences and successes with other teams, which will aid in adoption across the rest of the organization.

Let the pilot run for at least 1-2 quarters, and after each quarter, evaluate what works, what doesn't, and what you want to improve. Typically, it takes 6-12 months for OKRs to start functioning and making sense in companies. **The goal of the pilot is to learn, understand, and minimize the negative impacts caused by poor implementation.**

Focus on Results, Not Outputs

An output is something we do, for example, writing a blog article. **An outcome** is the desired impact of what we do. In the case of a blog article, why are we writing it? What do we want to achieve? For instance, "People will read our post" or "People will register for the mentioned webinar in the post."

We have **control over outputs**.
We **don't have control over outcomes**. We **only influence** them.

We are more accustomed to thinking primarily about the work delivered rather than the impact of our work. If we complete all our tasks, but nothing improves, can that be considered a success? Like a blog post that nobody reads.

When we are accustomed to focusing on outputs, we often latch onto the first idea, which may not be the best one. When we shift our focus to results, it **allows us to generate many ideas on how to reach the goal and choose the most effective one.**

OKRs should primarily be **about results.**

PRACTICAL TIP

- **How to Turn Outputs into Outcomes?** Ask Yourself the Following Questions:
 - What is the intended outcome of this task?
 - What do we want to achieve?
 - What will people do differently?
 - What will happen out there if this task is successful?

Output example	Conversion to result
Write a blog post	People sign up for our newsletter
Create a website	We have more attractive leads
Deliver a new feature in a product	Users use the feature
Call a potential client	Acquire a new client
Create a customer activation program	Increase customer satisfaction
Create an engagement program	Employees recommend our company more
Run regularly	Reduce weight / Accelerate pace to 1km

How to Write Good Objectives

The Objective answers the question, "What do we want to achieve?" What is the most important area in which we need to make measurable progress in the current near term? Its **purpose is to motivate** and **set a goal** to strive for.

Key characteristics of a good Objective can be summarized for clarity:

- **They are inspirational and motivating:** They should be formulated to inspire and motivate the team to achieve them. They should be attractive and meaningful to all involved parties.
- **They are clear and understandable:** They should be unambiguous and comprehensible to all team members. Everyone should clearly understand the goal and why it is important.
- **They are challenging but achievable:** Objectives should be ambitious to provoke the team to achieve maximum performance, but they should also be realistic and attainable to prevent frustration and demotivation.
- **They are strategic and in line with the overall goals of the organization:** They should align with the overall strategy and vision of the organization. They should be relevant and contribute to the long-term goals of the organization.
- **They are time-bound:** Each Objective should have a clearly defined timeframe within which it should be achieved.
- **They are qualitative:** The Objective is an inspirational statement and is not measurable. Measurability is reserved for Key Results.

The best Objective works when it's short and memorable, motivating the team to take action. It typically starts with a verb.

Examples of **good Objectives**

- Transforming the Web into a Customer Machine
- When I hear pizza, I think of [brand].
- Become the top choice for startup agencies in Central Europe.
- Break through in the American market.
- A product so simple that even the CEO can use it.
- Provide top-notch customer support.

Examples of **poor Objectives**

- Increase Revenue
- Implement a new payment gateway.
- We want to diversify and improve our portfolio of offered services and products to be able to cover all customer needs, be less vulnerable to economic fluctuations, and more competitive.

Too general, doesn't provide direction or strategy, I'll hide everything behind it.

This is an activity I'll do. It doesn't explain why I'm implementing a payment gateway. What do I want to achieve? Why am I doing it?

Too long, hard to remember.

PRACTICAL TIP

- For each Objective, define the **Why and Why Now**. Why did you choose this Objective and why is it important now? It helps in alignment and motivation.
- For defining the Objective's name, **take 3-4 minutes of quiet brainstorming and write down ideas**. Discuss and further develop those ideas.
- **Use ChatGPT** as an assistant for brainstorming the name. Review its outputs and expand on the ones you like the most.
- You can also use the **formula: Objective = Verb + Adjective + Desired Result**.
- We recommend assigning an owner to each Objective who will lead it to successful fulfillment.

MAGIC QUESTIONS FOR BUILDING OBJECTIVES

- 01** What is the most crucial area in which we need to make measurable progress in the current near-term period?
- 02** What do we want to achieve?
- 03** Why? Why now?



OKRs / KPIs
Evaluation
Surveys
HR admin

How To Write Good Key Results

Key Results answer the question of **how we will know if we have achieved the Objective**. Key Results **translate our Objective into numbers**. The Objective is qualitative, and everyone may have a slightly different interpretation of it. Therefore, we have Key Results that clearly specify how we measure success and when we consider the goal to be achieved. **Numbers don't lie.**

Important characteristics of a good Key Result are **S.M.A.R.T.**

- **They are specific and measurable:** Key Results should be quantifiable, meaning they should have a numerical value that can be measured.
- **They are ambitious but achievable:** Set Key Results that motivate the team to perform at their best, but they must be attainable. Unrealistic Key Results are not motivating.
- **They include a starting and target value:** They express an ambition to improve a certain metric from the current to the target value.
- **They are time-bound:** There should be a clearly defined time frame for when the Key Result should be achieved.
- **They are aligned with the Objective:** Key Results must be directly aligned with the Objective and reflect its achievement.
- **They focus on outcomes, not outputs:** Ideal Key Results focus on outcomes, not outputs.

We recommend setting **2-4 Key Results for each Objective**. Less is more in this case.

Select truly Key results.

Formula for writing a good Key Result: **Increase/Decrease** [metric ABC] **from** [X] **to** [Y] **by** [Z].

Examples of **good Key Results**

- Increase the number of registered newsletter subscribers from 200 to 2,000 by the end of Q2.
- Increase the number of daily active users from 2,000 to 10,000 by the end of the year. Examples of good Key Results
- Increase the number of referrals from 30 to 150 by the end of the year.
- Reduce the average time from testing to product purchase from 30 days to 15 by the end of Q3.
- Increase revenue from the sale of the new product from 100,000 CZK to 1,000,000 CZK by the end of the year.

Examples of **poor Key Results**

- Launch the new website by the end of Q1.
- Increase the profitability index from 2 to 6.
- Raise the NPS (Net Promoter Score) to 50.
- Deliver 3 new features.
- KR: Acquire 5 new partners.
Objective: Improve the activation of new customers.

This is an activity = output. It doesn't tell us anything about the quality and the result you want to achieve.

This looks like an internally created index where it's not clear how it counts. And therefore **not much transparent to others** in the company. Others should understand what we're measuring and how.

This is not entirely wrong, but it's better to include the initial value in KR. It's not clear whether you are increasing it from 48 to 50 or from 20 to 50, which is a completely different ambition. **Note:** this can be used when you don't have an initial value today and are setting where you could be at the end.

While it's measurable, it's an output. It's better to focus on the outcome. **Be cautious of disguising measurable tasks as Key Results!**

In this case, the Key Result is not aligned with the given Objective (at least at first glance). **Be careful about pushing the agenda of something else that is not related to the specific goal!**

PRACTICAL TIP

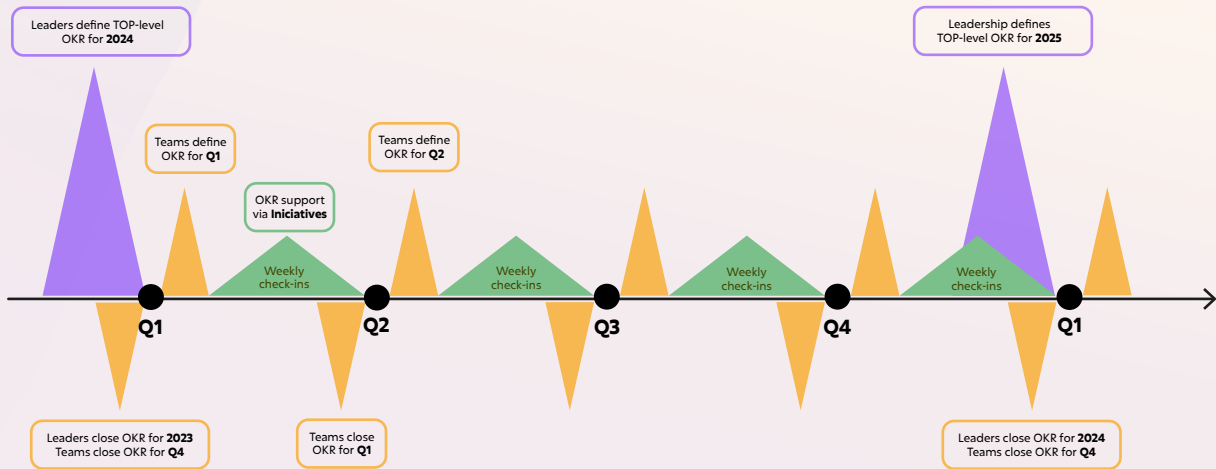
- At the beginning, you often don't measure things. You don't have an initial value. It's okay to start by finding the current value. At the same time, it's difficult to estimate where you can end up. It's okay to make an educated guess for the target value – where you would like to end up. Learn from this for future cycles. Alternatively, you can find a value on the internet for comparison.
- **Always ask how difficult it is to measure a particular metric.** If it takes you longer than a quarter to prepare the measurement, it's better to come up with a different metric. It should also not be complicated to retrieve the value every week.
- **We recommend assigning an owner to each Key Result.**
- **Setting the target value at about 10-20% beyond what the team believes is achievable is recommended.** We should have about 50% confidence that we will achieve the goal. It's better to set lower goals at the beginning and aim for greater ambitions over time.

MAGIC QUESTIONS FOR BUILDING OBJECTIVES

- 01** How do we know if we have achieved the Objective?
- 02** What does success look like?

How To Set the Whole Cycle

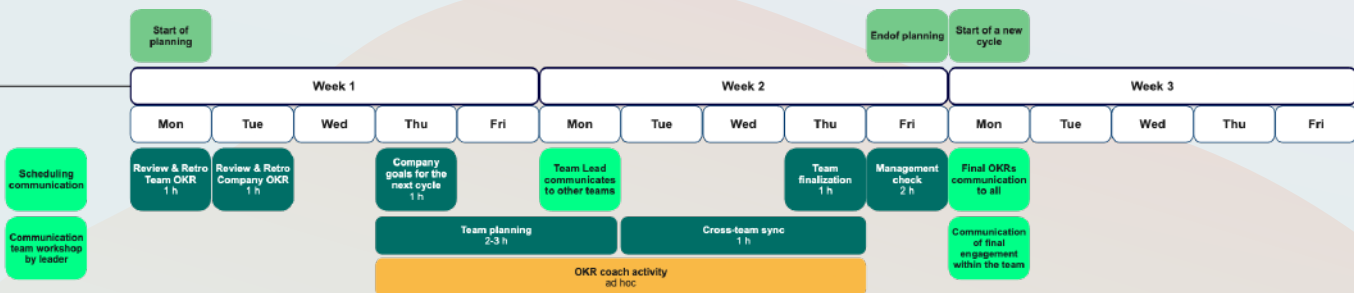
One of the key elements of OKRs and making them work is **following and setting up routines**. Basic rhythm and routines are shown in the following figure.



Another challenge is the **alignment and coordination of the entire company** during the closure of the current period and the planning of the next period. In this section, we are based on recommendations that work with a 4-month cycle. Therefore, planning takes place three times a year.

There are many approaches, and when you visit any company that uses OKRs today, you will likely see a different process and way of working with OKRs each time. Our goal was to define a process in a group of the leading OKRs experts in the Czech Republic that should initially cover the needs of companies with around 200 employees.

We focused particularly on the amount of administration and time required for OKRs planning. It's a significant topic and one of the biggest reasons not to introduce OKRs into a company. We managed to create a model with the best cost-performance ratio. For the amount of time we invest in planning, it allows us to fully harness the potential of OKRs. All the times listed for individual meetings are a goal that we should gradually iterate towards. It's clear that at the beginning, some meetings may take longer because the organization is still adapting to the planning process. However, if even after a year, your meetings are time-consuming, we recommend reviewing and finding out the reason for this.



The image above is a visualization of part of the planning cycle, showing a **2-week period** at the very beginning where it's necessary to conclude the previous planning period. At the end of the image, we have a plan for the next planning period. During these weeks, several key meetings and steps toward successful planning take place.

OKRs Workshops

In this section, we will look at how to conduct the two main workshops - **the development of the OKRs and the evaluation at the end of the cycle.**

Creating OKRs at the company level

One of the first workshops usually involves creating OKRs at the highest level within the company. These are the goals set by the company's leadership based on its strategy. They provide the direction the company should follow and how to recognize if the direction is being adhered to.

Corporate OKRs then inform leaders and teams throughout the rest of the organization about what's important and provide guidance for alignment at the next level. For success at the next level, **it's essential to have corporate OKRs set correctly.**

Who: The company's leadership team + optionally other key individuals + a facilitator or OKRs coach

Time: For 2-3 corporate OKRs, it typically takes 2x 3-4 hours

Format: Ideally in-person, but it can also be done online

NOTE

Why is it better to split the workshop into multiple days?

After 4 hours, concentration begins to decline, and the workshop loses its momentum.

Therefore, it's better to think through the outcomes of the first part of the workshop in the following week and return with any additional suggestions.

Workshop Part 1

Goal: The aim of the first part of the workshop is to develop draft Objectives for the period and nominate the owners who will lead their implementation.

Preparation: Each participant will come up with one proposal for an Objective at the corporate level for the period.

Time	Topic
9:00 - 9:15	Agenda, Objectives of the workshop, vision, mission and strategy reminder
9:15 - 10:00	Key strategic areas for the period
10:00 - 10:10	Break
10:10 - 11:10	Objectives I
11:10 - 11:20	Break
11:20 - 12:00	Objectives II
12:00 - 12:20	Objectives Owners
12:20 - 12:30	Summary and next steps

NOTE

If you manage to finish the first part early, it's only good. But it's good to have more time for the larger discussions that are common in a workshop like this.

Workshop Part 2

Goal: The aim of the second part of the workshop is to confirm the Objectives, assign an owner, and have the initial proposals for Key Results and their owners.

Preparation: The owner of the company Objective will come up with a suggested name and may also propose Key Results. Others can also suggest Key Results.

Time	Topic
9:00 - 9:15	Agenda, Objectives of the workshop, Reminder of the outcomes of the first part
9:15 - 9:50	Presentation of the final designs of Objectives, owners and discussion
9:50 - 10:00	Break
10:00 - 10:50	Key Results for Objective 1
10:50 - 11:00	Break
11:00 - 11:50	Key Results for Objective 2
11:50 - 12:00	Break
12:00 - 12:50	Key Results for Objective 3
12:50 - 13:00	Summary and next steps

NOTE

The length of the second part will depend on the number of company OKRs.

Creating OKRs at team level

Team workshops usually follow after the OKRs have been announced at the company level. After the announcement, it's time to discuss these priorities with the team and collectively consider where the team can contribute the most to achieving one of the Key Results.

At the beginning, we recommend that the team **sets only one OKR** that will contribute to one of the OKRs at the company level. **It's not advisable to split the focus across multiple objectives.**

PRACTICAL TIP

What if my team cannot influence any of the company's OKRs?

It's okay if some teams in a given period don't contribute to or aren't involved in OKRs at all, provided it's defined within the parameters. There can be several reasons for this:

- The team has **high BAU** (Business-as-usual or operational work) in that period.
- The team is more project-oriented, **OKRs may not be the most suitable tool for them.**
- The team **cannot influence** the specific **OKRs.**

It's a good practice for the team to at least discuss this and try to think about how their work can help achieve those objectives or what they can do to contribute. If OKRs don't make sense for a particular team, they can use this workshop to align their priorities for the period and come up with other internal innovations, which could be referred to as local OKRs.

Who: Team Lead/Manager + Team Members + optional facilitator or OKR coach

Time: 2-3 hours

Format: Preferably physically together, but can also be online

Time	Topic
9:00 - 9:15	Agenda, Objectives of the workshop, Reminder of OKRs at corporate level and team missions
9:15 - 9:30	Areas where the team can contribute most
9:30 - 10:00	Brainstorm team areas to contribute
10:00 - 10:10	Break
10:10 - 11:00	Why/Why now, Objective name and owner definition
11:00 - 11:10	Break
11:10 - 11:50	Definition of Key Results and Owners
11:50 - 12:00	Summary and next steps

Question for team OKRs

Which area of our work represents the greatest contribution to achieving the higher goal?

Closure and evaluation of OKRs

OKRs are primarily about learning. You learn what works, what doesn't, and can iterate quickly and avoid resource waste. That's why it's important to **regularly pause and reflect on the lessons learned**.

By default, we recommend conducting a **quarterly review and evaluation before planning the next cycle**.

Who: Everyone involved in the given OKR

Time: 30-60 minutes

Format: As is customary in the company for conducting OKR check-ins

Goal: The goal is to become aware of why we achieved or didn't achieve the set objective and what we learned in the process.

Preparation: Each owner of a Key Result fills in its final value and prepares a retrospective. They will all reflect on the OKRs process and **come up with suggestions for improvement**.

Time	Topic
9:00 - 9:05	Agenda, Objectives of the workshop, Rules
9:05 - 9:35	Evaluating the final results and capturing lessons learned
9:35 - 9:55	A retrospective on the process
9:55 - 10:00	Summary and next steps

Inspiration for workshop design

We have created a Miro board for all 3 workshops described here, which you can use for inspiration and **use as a model**. [Click HERE to download](#).

OKR Check-ins

OKR Check-Ins are regular meetings held during a quarter (or another set period for which OKRs are defined) to evaluate progress towards achieving key results. These meetings:

- ↳ **Promote transparency:** All participants have the opportunity to see the direction things are heading and how teams or individuals are getting closer to their goals
- ↳ **Provide continuous feedback:** Instead of waiting until the end of the quarter or another specified period, teams can immediately identify issues and adapt their strategy.
- ↳ **Stimulate discussions about priorities:** Teams can reevaluate whether their current initiatives are leading to the achievement of key results and discuss what needs to change.

OKR Check-In meetings typically involve the **OKR Owner** and **team members**. However, it always depends on the size and structure of the organization.

Recommended practices for OKR Check-In meetings:

- ! **Come prepared:** Before the meeting, all participants should update their Key Results to reflect current progress.
- ! **Keep meetings short and focused:** These meetings should be quick, efficient, and focused on progress and obstacles. Overly long or unfocused meetings can diminish the team's enthusiasm for the OKR method.
- ! **Encourage open communication:** The environment should be conducive to people feeling comfortable sharing their successes, challenges, and concerns.
- ! **Prepare and implement action steps:** If issues are identified, discuss possible solutions and create an action plan to address them.

PRACTICAL TIP

We recommend using the 3P Structure:

- PROGRES**
 - What are the current results?
 - What has changed since last time?
 - How confident are you that we will meet the KR's?
- PROBLEM**
 - What challenges or obstacles do we have?
- PLAN**
 - What is the plan for the next period?

OKR Tracking

There are several ways to manage, visualize, or simply keep track of OKRs in your organization. A basic recommendation for tracking OKRs at the beginning is to use tools that your organization is familiar with.

NOTE

The implementation of OKRs itself is a significant change, and introducing a new tool for managing OKRs will only add to this complexity. On the other hand, it won't bring any significant benefits at the outset

It's entirely up to you. If, for example, you use Confluence or Jira, you can work with OKRs directly in these tools. If not, we recommend using Excel. Its significant advantage is that it can be customized and adapted to the process, especially in the early stages when it's a "living organism."

This process is constantly changing, and with that comes the need to change the tool you use to manage OKRs. Once you have OKRs implemented in your organization, and the entire organization is accustomed to this approach, you can then consider specialized tools for working with OKRs. However, there's no shame in sticking with Excel for a long time. 😊

And because creating an Excel sheet itself may not be easy, we have prepared a basic template that corresponds to the implementation approach discussed throughout this ebook.

[You can find the Excel template by clicking HERE.](#)

What needs to be monitored and why?

Objectives + Key Results and the **key metrics**:

- **Initial Value:** Helps you determine your starting point. Knowing the initial state enables you to measure progress and assess changes over time.
- **Target Value:** Defines your final goal. This value is crucial for evaluating whether you have achieved your objective or not.
- **Current Value:** Indicates your current progress toward the target value. Monitoring the current value allows you to determine if you are on the right path to achieving your OKRs.
- **Confidence in Result Delivery:** Measuring confidence in whether a team or individual can deliver the key result is important for risk assessment and identifying areas that may require additional support or resources.
- **Owners of Objectives and Key Results:** Assigning owners ensures that each objective or key result is assigned to a specific person or team, providing responsibility and clarity in task allocation.
- **Status:** The status provides a quick overview of where you currently stand in the process of achieving your OKRs. Statuses can include "In Progress," "Completed," "Delayed," or "Blocked," allowing you to quickly respond to potential issues and obstacles.

Roles in OKRs

It's good to involve more people in OKRs to help scale the program within the company. At the beginning, we recommend defining key roles and their responsibilities. Here are some basic examples of roles **that have proven effective for us**. You can have more or fewer roles depending on the size and maturity of the company.

OKRs Ambassador

Manages the entire program, including implementation.

Responsibilities

- Setting key parameters for program implementation
- Evaluating and improving the OKRs process, including feedback collection
- Communicating and informing the company about OKRs
- Educating others in OKRs
- Monitoring the quality and alignment of set OKRs
- Supporting everyone in the company with OKRs-related matters

Ideal candidate

Should be an internal person. Ideally, someone from middle management or a similar position. Must have excellent communication skills and a willingness to learn about OKRs.

OKR Lead at the Company Level

Leads the Objective at the highest level.

Responsibilities

- The result of the given Objective
- Communicating results, lessons learned, and the context of the Objective to the company and relevant teams.
- Defining key individuals and teams needed to succeed in the given Objective
- Escalating insufficient progress or obstacles to the top leadership team of the company
- Leading regular check-ins with aligned teams for the given Objective
- Ensuring that affiliated teams have up-to-date reporting and necessary support for their OKR success

Ideal Candidate

Someone from higher positions in the company's leadership who is closest to the specific topic and **has decision-making authority**.

OKR Lead at the Team Level

Leads the fulfillment of Objectives at the team level.

Responsibilities

- The result of the team's Objective
- Ensuring resources and planning activities within the team that will lead to the desired results.
- Escalating insufficient progress or obstacles to the OKR Leader at a higher level.
- Ensuring that the team has up-to-date reporting and necessary support for their OKR success
- Leading regular check-ins at the level of the specific OKR
- Planning the closure and evaluation of the specific OKR at the end of the cycle

Ideal Candidate

Someone from the team who is interested and has the potential to lead the specific Objective.

KR (Key Result) Owner

An expert who has the most significant influence on the delivery of the specific Key Result.

Responsibilities

- Designing activities that will lead to the delivery of the specific result
- Escalating insufficient progress or obstacles to the OKR Leader at the company or team level
- Updating the value of the specific Key Result no later than before the check-in

Ideal Candidate

An expert from the team who has the most knowledge of the subject in the specific Key Result.

Team Member

Contributes to the team's OKR and owns initiatives.

Responsibilities

- Defining the right initiatives that will lead to the desired results
- Reporting the status of initiatives
- Escalating insufficient progress or obstacles in the specific initiative to the OKR Leader

Ideal Candidate

An expert from the team who is interested in collaborating on the specific OKR.

OKRs coach

Facilitates workshops and defines OKRs.

Responsibilities

- The quality of the set OKRs
- Workshop effectiveness and goal achievement

Ideal Candidate

Can be internal or external. Suitable internal candidates include team leaders or scrum masters.

PRACTICAL TIP

When scaling the program, it is useful to **identify facilitators from each team**. They will help with the management of OKRs in their teams. It is a good idea to target these facilitators with extensive training for increase the quality of their facilitation skills.

Cross-functional OKRs

In the examples above, we always provided OKRs for a single team or function. Typically, OKRs for the customer support team, another for marketing, and so on. This approach is simpler and recommended at the beginning, where the goal is to adopt and learn OKRs.

However, cross-functional OKRs work best. These are **common goals for multiple functions**. For example, a goal that involves product, sales, marketing, and customer success. Such cross-functional OKRs **break down silos** in the organization and **promote collaboration across teams** that would otherwise collaborate only occasionally. This allows you to build a virtual team around a specific customer need and ensure the most effective delivery.

Examples of cross-functional OKRs

Objective 1: Delight our customers like never before

Key Results

- Increased Net Promoter Score (NPS) from 40 to 60
- • Reduced the average time to resolve a customer support request from 6 to 2 hours
- Implement 3 features requested by customers with a satisfaction rate of at least 70%

Departments involved

Customer Support, Product Team, Marketing

Objective 2: Revolutionising our new product offering

Key Results

- Generate \$2 million in revenue from new products
- • Achieve a 25% conversion rate on new product promotional campaigns
- Secure 5 enterprise contracts for new products

Departments Involved

Sales Team, Product Team, Marketing

Objective 3: Make our company the best place to work

Key Results

- Achieve 85% employee satisfaction across the company
- • Monthly individual meetings with 90% of employees
- Reduced technical debt by 20%

Departments involved

HR, Management, Technical department

How to make cross-functional OKRs work?

There are several ways to create cross-functional OKRs. The easiest way is if the organization already operates in such a mode and its organizational structure aligns with it. If not, and the company operates in standard departments, you can approach it, for example, by:

- The team proposing the Objective and the teams it needs to achieve it. The owner presents the proposal to the representatives of the suggested teams, and they agree on or adjust the objective.
- Teams that often collaborate, such as Sales and Marketing, create the OKR together.
- Teams and representatives are nominated for the corporate OKR, and they then collectively create team areas and nominate additional representatives.

Cross-functional OKRs are more challenging but more effective. If the organization is not accustomed to operating this way, it may face initial challenges, and it's necessary to continually improve the process.

Save 20 hours per week
on HR processes and operations
with Sloneek

Sloneek

Free Download

[Free Trial](#)
[Request Demo](#)

[Buyers Guide to HRIS](#)
[Onboarding checklist](#)
[Creation and evaluation of competencies](#)



Example of Specific OKRs in One Company

Objective answers the question **What do we want to achieve?** What is the most important area in which we need to make measurable progress in the current near term? Its **purpose** is to **motivate** and **set the goal we're after**.

COMPANY LEVEL OKR

- **Becoming a leader in customer satisfaction in our industry**
- KR 1** Rank 1st in an independent ranking in the customer satisfaction category
- KR 2** Increase the percentage of customers who would recommend us (Net Promoter Score - NPS) from 45 to 60 by the end of the year
- KR 3** Increase the percentage of customers who buy from us again from 50% to 70% by the end of the year

Team level OKR - Marketing team

- **Effectively communicate our strengths in customer satisfaction to the marketplace**
- KR 1** Get 300 new leads from PR events focused on our excellent customer satisfaction
- KR 2** Get 5 positive reviews from professional media about our customer approach
- KR 3** Increase the monthly number of visitors to our website from 50 000 to 60 000

Team level OKR - Development team

- **Optimize our product for the best user experience**
- KR 1** Increase product UI rating from the current 70% to 90%
- KR 2** Increase the percentage of users who achieve critical adoption in the product from 50% to 75%
- KR 3** Reduce the number of bug reports from the product UI by 40%

Team level OKR - Customer Care Team

- **Provide the best customer service in the industry**
- KR 1** Reduce response time to customer inquiries from 24 hours to 3 hours
- KR 2** Get 10 new testimonials on our customer service
- KR 3** Increase customer satisfaction with our service from 80% to 90%

How To Use OKRs and KPIs Together

OKRs are targets within our strategy. These are the most important things we need to achieve in a given period (usually a quarter or a year) to get closer to our vision. OKRs set the direction and, like a stage spotlight, focus attention on what is most important. **They express the ambition to make a difference.**

Beyond these strategic ambitions, there are many other things in the company that need to be addressed. Requirements from existing customers. Acquisition of new customers. Payroll processing. Availability of systems. Quality and more. These are operational issues, also called **business-as-usual** (BAU). It's just as important as focusing on strategic priorities.

BAU helps us keep our operations up to date, OKRs help us grow and fulfil our ambitions.



If we **only address BAU**, we don't change anything and maintain the status quo. When we **deal with only OKRs**, we may overlook a problem in the existing business.



Existing customers will start to leave. Or employees. Or we're growing a product quality problem.



So the goal is to focus on the top strategic priorities while monitoring the health of our organization.

The main strategic priorities are addressed through OKRs. We can **monitor the health of our business through KPIs** (Key Performance Indicators). **It's good to have these 2 things side by side.**

NOTE

Think of it like riding in a car. OKRs give us directions and help us navigate if we're going correctly and determine whether we've reached our destination. KPIs are the lights in the car and help us monitor whether we have enough fuel, the engine is not overheating and we are maintaining the correct speed to our destination.

Can a KPI also be an OKR?

YES. If a "health" metric reaches the red level, we can shine a spotlight on it through OKRs. This signals to the rest of the organization that this metric is critical, and it's necessary to bring it back to a healthy level. The remaining metrics at a healthy level only need to be monitored.

PRACTICAL TIP

- When setting the frequency of check-ins, also look at how often you will be browsing and monitor KPIs or Health Metrics.
- If you have a check-in once every 14 days, you can also check in together look at the KPIs.
- For example, weekly check-in frequency and monthly check-in frequency work in other organisations KPIs.
- You can use e.g. Semaphore for a quick signalling of health status:
 - Green** = metric is at a healthy level
 - Yellow** = metric is within 90% of healthy level
 - Red** = metric has dropped below 90% of healthy level

We're at the End. Remember that...

- ↳ It's all recommendations
- ↳ Don't take it as dogma, you need to tailor it to your needs and your company
- ↳ Be patient!
- ↳ Be persistent!
- ↳ Don't get discouraged by possible initial setbacks!

Good luck!

About the Creators of the e-book



Martin Imrich



Chief Customer Officer | Safetica

With over twelve years of experience in the IT and software development world, Martin is an expert in the field of technology and its integration with the business sphere. In his current role as Chief Customer Officer at Safetica, he proudly leads customer-focused teams, working together to protect companies worldwide from data breaches and internal threats. His passion for efficiency and strategy is reflected in his role as an **OKR Ambassador**. Martin has not only successfully implemented and leads the OKR program but also actively shares his knowledge in local and international communities, inspiring and advising on their importance and effective use.



Jan Šebek



Chief Transformation Officer | MoroSystems

In the early stages of his career, Jan was involved in entrepreneurship, particularly in the e-commerce sector. Later, at Seznam, he successfully built an agile project office. The concepts of agility, efficiency, and executing the "right" steps led him to the principles of the OKR framework, which he enthusiastically began implementing at MoroSystems. He enjoys sharing his knowledge and experience with others and aligns his daily activities with the company's long-term strategy and vision. Lastly, he loves working on projects that others consider impossible or unattainable and brings them to life.

Thanks for the support!

OKR Mastermind | [contact us](#)

OKR Mastermind

OKR Mastermind is an active community of experts and enthusiasts in the field of OKRs, providing a space for both beginners and experienced professionals. Our platform is a key hub for sharing best practices, engaging in intense discussions, and continuous improvement.

In addition to community support, we offer consulting services to companies looking to effectively implement OKRs. Regardless of your level of expertise in OKRs, OKR Mastermind is your reliable partner on the journey to achieving mastery in OKRs and successfully implementing them.

Safetica | [safetica.com](#)

safetica

Safetica is a Czech technology company specializing in software data protection against leaks and internal threats.

Since its founding in 2007, the company has experienced rapid growth and now operates globally in over 120 countries with a team of over 100 security experts. Safetica offers exceptional data protection solutions that can run both in the cloud and on-premises, making data security effortless.

They are proud partners of renowned companies such as **ESET**, **Fortinet**, and **Microsoft**.

MoroSystems | [morosystems.com](#)

MOROSYSTEMS

Everything we do at MoroSystems is based on the belief that people can achieve exceptional results, especially when they collaborate. For us, the model of a collaborating community of people is the team. That's why we seek out and attract the most talented individuals in the field of information technology and bring them together into teams. This is the fundamental essence of our way of working and the reason we can achieve extraordinary results.

Among our long-standing and satisfied customers are **eBay**, **AEVI**, **Benefit Plus**, **Publicis**, and **Uniqqa**.